

MAG TELECONFERENCING POLICIES AND PROCEDURES GUIDE

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The following forms are located in the MAG Videoconference Training Guide:

Scheduling and Documenting Form

Confirmation/Notification Form

Site Certification Form

Site Information Form

DEFINITIONS

Audioconference Server (ACS) - The ACS allows sites to participate in audioconference meetings with three or more sites in one audioconference.

Certified Partnered Sites - A partnered site is a site that is outside the MAG Regional network and not directly under the control of any of the MAG end site coordinators, but is certified.

Hub Site Coordinator (HSC) - The HSC is the single point of contact at the MAG hub site location.

MAG meeting - A teleconference meeting on MAG issues. MAG business meetings will be paid for by MAG.

Multipoint - Three or more sites involved in an audio or video call.

Multipoint Conference Server (MCS) - The MCS allows sites to participate in videoconference meetings with three or more sites in one videoconference.

Non-certified site - A non-certified site is a new video site with whom none of the MAG or MAG member agency sites have ever teleconferenced. Since little or nothing is known about the non-certified site, MAG needs to collect contact and video site information on the site.

Non-MAG meeting - A teleconference meeting not on MAG issues. Non-MAG business meetings will not be paid for by MAG.

Originating Site Coordinator (OSC) - The OSC is a site coordinator from one of the 28 end sites that would like to originate a conference call. Keep in mind that each end site will provide an end site coordinator (and backup) as the single point of contact for that end site and that site coordinators will have certain responsibilities to ensure the Regional Videoconferencing System (RVS) is a success.

Point-to-Point - Two sites involved in an audio or video call.

Regional Videoconferencing Office - The MAG Help Desk for the Regional Videoconferencing System.

Site Coordinator - A site coordinator is the single point of contact at each end site, who administers the videoconference and audioconference system and assists end users when necessary.

SPOC - Single Point of Contact - is the main point of contact for all site users for system scheduling, room scheduling (scheduling room other than videoconferencing needs),

system assistance, trouble reporting. The site coordinator is the SPOC and should be responsible for backup coordinators, in delivering new information on site, and should be the liaison between their location and the hub site.

Teleconference - Includes videoconferencing and audioconferencing.

INTRODUCTION

The Maricopa Association of Governments (MAG) has implemented a regional teleconferencing solution that includes voice, video, and data collaboration. The goals for the MAG Regional Videoconferencing System (RVS) are to reduce travel to provide better air quality, save time, improve communications processes, widen agency participation, increase public involvement, and widen communications outside the region. The purpose of the MAG Regional Teleconferencing System is to link MAG with its member agencies via a region-wide teleconferencing system that will allow member agencies to teleconference to meetings thereby reducing travel and congestion and enhancing air quality.

These teleconferencing policies and procedures cover a wide array of topics from scheduling and call launch procedures to internal marketing and communications, from service and support to staffing. All of these topics focus on one clear objective: Building the most effective and efficient teleconferencing network.

Teleconferencing has seen a tremendous growth in the last five years; the teleconferencing industry has matured with more reliable equipment, software and networks. Teleconferencing is an extremely valuable business tool. In order to provide an optimal success rate for teleconferencing activities, participants should follow the policies and procedures in this guide.

Please keep one copy of this document in each videoconference room so that it is readily available to all users, participants and operators of the system.

COMPONENTS OF A TELECONFERENCING ENVIRONMENT

The Policies and Procedures Guide is divided into several sections. Each section discusses a specific segment of the MAG teleconferencing policies and procedures. Many roles are identified throughout this document referring to coordinators. The Hub Site Coordinator (HSC) is an individual located at the hub site location (MAG) operating the multipoint conference server (MCS) and audio conference server (ACS) and assisting end users with teleconferencing systems. The site coordinator is one individual with one or two backups at each member agency site who can assist with teleconferencing needs on an occasional basis.

1.0 Scheduling

The scheduling policies and procedures detail the process that the Originating Site Coordinator (OSC), and the Hub Site Coordinator (HSC), should use to schedule videoconferences, audioconferences and other teleconference room use. The HSC is the single point of contact (SPOC) at the MAG or hub site location. The OSC is a site coordinator from one of the 28 end sites that would like to originate a teleconference. Each end site will provide one site coordinator and a backup site coordinator as the RVS SPOC for that location. End users will have 8 hours per day; 5 days per week access to teleconferencing services from the hub site unless additional availability is previously requested by the OSC.

2.0 Call Launching

Teleconferencing is a complex technology. For point-to-point teleconferences, end sites will always be responsible for launching the call from their site. For multipoint conferences the HSC will out-dial to the sites unless the end site requests that they dial-in to the MCS.

3.0 Multipoint Conference Server (MCS)

A large number of videoconferences may be multipoint calls with three or more sites; therefore, procedures must be in place to ensure the MCS is reserved and test calls conducted so that the multipoint conference is a success.

4.0 Service

A single point of contact for all videoconferencing related services is recommended for all end users. End users will be able to contact their site coordinators or the Hub Site Coordinator (HSC) phone number to schedule, modify or cancel a teleconference.

5.0 Site Certification

Hub Site Coordinators will contact all new sites or partnered sites and perform a site certification process. Site certification is obtaining all pertinent information about the new site and placing calls to test successful connectivity. Through site certification, the HSC will gather the required information about each site to ensure a consistent and reliable videoconference.

6.0 Maintenance and Support

The vendor will provide a high level of maintenance and support services for the audio/video systems, the video MCS, the ACS and the network. In the event of component failure, the vendor will guarantee four business hour parts and on-site technician support. Site coordinators will have one number to dial for assistance.

7.0 Training

Training is a fundamental component of a successful teleconferencing environment. Initial training was supplied by the vendor. On-going training and training materials will be provided by MAG and site coordinators who are able to train end users on the basics of the teleconferencing system. Ongoing training for site coordinators will be provided by the HSC as needed. See the Training Course Plan for details.

8.0 Communication and Marketing

End users must know that teleconferencing is available and be shown and encouraged to use the equipment. An effective marketing or communications campaign will enable end users to make the most of the teleconference environment. See the Communications and Marketing Plan for details.

9.0 Staffing

In order to maintain processes and procedures at all end user sites, proper staffing is required. This staffing may not require additional head count at each location, but identifying individuals to take responsibility in the teleconferencing area. See the Staffing Plan for details.

10.0 General

In addition to the above, there are a number of policies and procedures that apply generally to the success of the RVS.

1.0 SCHEDULING

1.1 Point-to-Point Video Calls

Policy

Point-to-point video calls are optionally scheduled through the MCS using the Reservation Process in 1.2 below. All required documentation must be completed for point-to-point calls. In the future, all forms will be web based.

Procedure

For point-to-point calls, the videoconference room and equipment are reserved directly with the site coordinator at participating locations. The Originating Site Coordinator (OSC) must notify the HSC of the videoconference room and equipment being reserved, so that the HSC can plan other conferences with minimum conflict. In addition, all documentation must be completed and submitted to the HSC three days following the meeting. (Refer to the Scheduling and Documenting Form).

1.2 Reservation Process

Policy

All multipoint conference calls using MAG-s MCS or Audio Conference Server (ACS) must be scheduled through the HSC.

MAG recommends that multipoint videoconferences with five or more sites be arranged 10 business days prior to the anticipated meeting date and a multipoint call with five or fewer sites be arranged 5 business days prior to the meeting date. MAG recommends that audioconferences be arranged 2 business days in advance of the anticipated meeting date. This lead time will facilitate more efficient coordination with the other participating sites, and if the hub site is involved, enough time to reserve a teleconference room in the hub site building.

Procedure

The OSC is responsible for contacting the HSC to schedule the MCS 10 or 5 business days prior to the meeting date depending on the size of the conference (see above), or the ACS 2 business days prior to the meeting date. The OSC should gather the information on The Scheduling and Documenting Form, for scheduling a meeting, and send The Scheduling and Documenting Form by e-mail to the HSC at (rvshelp@mag.maricopa.gov) or by fax to (602) 254-6490, 10 or 5 business days prior to the multipoint videoconferencing meeting or 2 days prior to the audioconference meeting.

The OSC of a multipoint conference is responsible for scheduling his/her room and equipment locally and for coordinating the scheduling for the other participants= rooms and equipment.

1.3 Confirmation/Notification

Policy

A confirmation notice will be sent to the OSC and all participating site coordinators upon the successful booking of a multipoint conference. A participating site coordinator is a site coordinator involved in the scheduling process because either he/she or someone from his/her site is participating in the meeting.

Procedure

The HSC will complete the Confirmation/Notification Form, and send it by e-mail or fax to the OSC. The OSC will e-mail or fax the Confirmation/Notification Form to participating site coordinators. The participating site coordinators will be responsible for notifying participants at their locations, confirming their attendance, and confirming reservation of the teleconference room and equipment, prior to the meeting.

Confirmation or conflicts should be sent to the OSC. The OSC must notify the HSC of any conflicts at least two days prior to the meeting.

1.4 Cancellation/Modification

Policy

Meetings can be canceled or modified at any time.

Procedure

The OSC must contact the HSC by e-mail or fax with the conference ID number (originally provided by the HSC) and the reason for cancellation or modification of the meeting. If the OSC needs to reschedule for a different date and time, then the OSC must contact the HSC by e-mail or fax to schedule a new meeting. Then the HSC will e-mail or fax a cancellation or modification notice to the OSC. If notifications were issued to meeting participants, the OSC will e-mail or fax a cancellation or modification notice to participating site coordinators who will notify all meeting participants.

1.5 Meeting Stop Time

Policy

All meetings will terminate at their scheduled stop time unless a meeting participant requests an extension within fifteen minutes of the scheduled stop time. The meeting participant must verify both the local room availability and the MCS or other site's availability. Stop times will be enforced when another scheduled meeting is in conflict.

Procedure

A meeting participant must contact the HSC at MAG by phone (602) 452-5095, at least fifteen minutes prior to the scheduled stop time. The meeting will be extended unless there is a scheduling conflict or resources are unavailable.

Note: The multipoint videoconference meetings will not automatically extend.

1.6 Audioconference or Videoconference Meeting Room

Policy

To accommodate the applicable Arizona open meeting laws, a meeting room should be reserved at the site that initiates a multipoint audio or videoconference public meeting.

Procedure

For all formal public meetings (as defined by the Arizona Open Meeting Law) that are audio or videoconferenced, the originating site coordinator will reserve the meeting room at their site, using that site's reservation process and make the room available to the public.

1.7 Documenting Meetings

Policy

All video or audioconference meetings are to be documented. Each site coordinator must maintain a log of all conference calls placed from their site.

Procedure

Documenting meetings may be accomplished by completing a form in either hard-copy or by e-mail. The OSC is responsible for completing the Scheduling and Documenting Form, when his/her site participates in a meeting. The Scheduling and Documenting Form is multi-purpose as it is used to schedule a meeting and as documentation after the meeting. The Scheduling and Documenting Form must be kept on file with the OSC and a signed and dated copy faxed, mailed, or e-mailed to the HSC within five business days of a meeting. This information will be useful in helping MAG to

track usage, costs and any problems which may need to be resolved as per funding requirements.

1.8 MAG Priorities for Teleconferencing Meetings

Policy

All meetings/rooms are to be scheduled according to the following priorities:

1. Executive meetings (e.g. Impromptu meeting of the city mayors)
2. Regularly scheduled MAG meetings (e.g. MAG Management Committee)
3. Policy committee meetings (e.g. MAG Air Quality Policy Committee)
4. Technical committee meetings (e.g. MAG Telecommunications Advisory Group)
5. First come first serve basis

If an issue cannot be resolved through these rules, an executive decision will be made by the MAG Executive Director, Assistant Director, or MAG Management, in that order.

2.0 CALL LAUNCH

2.1 End Site Call Launch

Policy

The OSC and participating sites will be responsible for setting up the point-to-point or multipoint conference call.

Procedure

Participating site coordinators will need the video numbers to dial-in to the MCS and the conference password, if applicable. The OSC will be responsible for distributing this information to the participating site coordinators.

2.2 Hub Site Call Launch

Policy

The OSC requests the HSC to set up the point-to-point or multipoint conference call.

Procedure

The HSC collects the video or audio numbers for each site from The Scheduling and Documenting Form. The HSC dials out to each site participating in the conference. This call should be made one hour prior to the actual videoconference. This set up time may decrease as users become more familiar with the videoconference equipment. Once the connection is established the site coordinator originating the multipoint conference (OSC) should conduct a roll call to ensure that each participating site is present and its participants can be seen and heard by all.

2.3 Incoming Call Auto Answer

Policy

It is preferential to maintain all video systems in an auto answer mode with audio and video mute.

Procedure

If an end user wants to receive a point-to-point video call from a third party, he or she may provide the third party with the videoconferencing connection numbers and appropriate call type. This information should be posted on in-room signs. The third party site can call the video system and conduct a conference.

The advantage of this type of call is that it requires no end user training or knowledge of using videoconferencing. Only the video system's phone numbers and

the call type need to be known and communicated by the end user. There is no long distance charge on an incoming call.

The disadvantage is that there is no quality monitoring and the call is dependent upon the knowledge of the calling party. In addition, if the calling party's site is not certified, there is no guarantee that the call will be successful. Users that will meet in the same room as the videoconferencing equipment should ensure that the system is in audio and video mute mode, with the audio volume turned down and the monitors off or that the unit is completely powered off during the meeting. This will be covered in end user training.

Policy

When you are accepting or making a call put your system in audio and video mute. Check that it is in audio and video mute mode when not in use.

Procedure

Site coordinators are responsible for muting their videoconferencing system and ensuring that it is in audio and video mute mode when not in use.

2.4 Audio Add-on

2.4.1 For One Audio Participant (Planned)

Policy

An audio only participant can join a scheduled videoconference meeting.

Procedure

If the conference requires the addition of an audio only participant, the OSC should complete The Scheduling and Documenting Form (which asks if a phone add-on is needed and the name and phone number of the participant). Then the OSC should initiate the audio call through the videoconference equipment phone add. All participants, on video or audio, will be able to hear and speak to each other.

2.4.2 For Multiple Audio Participants (Planned)

Policy

Multiple audio only participants in a multipoint audioconference call may be added to a scheduled videoconference.

Procedure

The OSC should collect the information, schedule the audioconference call and the HSC should provide the appropriate access phone number and Conference ID number to the OSC and meeting participants. Refer to the Confirmation/Notification Form.

2.4.3 For One Audio Participant (Impromptu)

Policy

An audio only participant can join a videoconference meeting impromptu.

Procedure

If the videoconference requires the addition of an audio only participant, the OSC should give the person who wants to join the conference the correct phone number to use the phone add-on. There is only one phone add-on port on the VTEL videoconference end site machines. All participants, on video or audio, will be able to hear and speak to each other.

2.44 For Multiple Audio Participants (Impromptu)

Policy

Multiple audio only participants in a multipoint audioconference call may be added to an unscheduled videoconference.

Procedure

If the videoconference requires the addition of audio only participants, the OSC should give the people who want to join the videoconference the correct phone number to dial-in to the phone add-on, of each VTEL machine in the videoconference. There can be only one audio participant for each VTEL machine in the videoconference. Again, all participants, on video or audio, will be able to hear and speak to each other. Alternatively, a Latitude multi site audioconference call can be set up and integrated into the videoconference.

2.5 Call Launching Period

Policy

Video calls should be connected and functioning properly at the start time of the videoconference. There will be a call launch window of one hour prior to any videoconference meeting for at least 3 months after system acceptance or until the site coordinators become familiar with using the videoconferencing equipment.

Procedure

The person launching the video call needs to make the call, respond to and resolve problems, and locate and involve the site coordinator. In order to provide adequate

time to perform these functions, a call launching period or window should be scheduled prior to the start of the meeting. The call launching window should initially be set at one hour. Over time, as the end users receive their training, site coordinators gain experience and comfort with the video systems and the HSC gains familiarity with the videoconferencing sites and process, this period may become smaller.

2.6 Hold an audioconference call to launch a multipoint videoconference

Policy

To set up a successful multipoint videoconference it is necessary to have all participating sites join an audioconference meeting at least one hour prior to the actual videoconference. During the audioconference, the HSC will ask each site if they have done the necessary steps to prepare for the videoconference. When all sites are confirmed ready, the multipoint videoconference will be launched by the HSC and the audio call will be disconnected. Individual calls will be made to sites that have problems connecting to the multipoint videoconference. Should the videoconference fail, the audioconference should be maintained as a backup.

Procedure

The HSC will follow the Pre-Videoconference Check List in the MAG Videoconference Training Guide. The HSC will e-mail all participants instructions on how to prepare for the videoconference. See example below.

AThe Feb. 19th 2:00 p.m. site coordinator meeting will be a 6 site multi-point videoconference. The following sites have requested to videoconference to the meeting:

Cave Creek
Chandler
Goodyear
Youngtown
Gila River Indian Community
MAG

Site coordinators responsible for setting up the videoconference at each site include:

Yvonne Passey - Cave Creek
Bob Leister - Chandler
John Imig - Goodyear
Alice Brain - Youngtown
Robin Fohrenkam - Gila River Indian Community
Heidi Pahl - MAG

Back up site coordinators have been notified in case they need to fill in for you.

To prepare for this meeting, a videoconference test call must be conducted. The video test call will be at 9:00 a.m. July 22nd, which means your videoconference unit must be turned on and working by 8:00 a.m. To assist us in setting up this multipoint videoconference, I would ask that everyone dial in to the Latitude audioconference at 8:00 a.m. From a phone in your videoconference meeting room, at 8:00 a.m. you will dial 602 261-7510, enter meeting id 84335. Once we are all in the audio call we can then proceed to set up the videoconference units at each site.

For the video test call to be a success you must follow steps 1-6 below to set up your videoconference unit.

We will need all of the videoconference systems turned on:

- 1) Take microphones out of the cabinet and place them on the table facing away from the monitors.
- 2) Turn on the system by pushing the power button on the front of the unit, and turn on the monitor.
- 3) Take the wireless keyboard out of the cabinet
- 4) The system will boot up (hit cancel when it asks for the windows password).
- 5) After the system has initiated (you will see a camera view of your room on the monitor)
- 6) Unplug the 1FB from the jack in the wall behind your videoconference unit.®

2.7 Call Transmission Performance Monitoring

Policy

If requested by the OSC, the HSC will monitor a videoconference call in order to provide a consistent, high quality of service. Call monitoring does not include the ability to see or hear any portion of the conference.

All MCS calls are monitored through the MCS control/monitor software. The HSC can see at all times that the video call is in-session, the data rates for audio and video transmission and the performance of each site. If a site departs the conference prior to the conference stop time, a visual alarm is presented to the HSC. The HSC CANNOT see or hear any part of the videoconference.

Procedure

The HSC should use the MCS control software to perform call monitoring if requested. The MCS call monitoring software allows the HSC to see statistics on the amount of voice, video and data bandwidth in use. During the course of call monitoring, the HSC should log any incidents that impact the quality of service. The incident logs become the basis for performance reports.

2.8 Re-launch Failed Calls

Policy

One relatively common cause for a failed conference or a dropped video call is a temporary loss of network signal. When a call drops, an error code is reported to the HSC monitoring the conference. The error code indicates whether there was a network error, MCS error or a line disconnect. If this happens during a monitored conference, the following procedure should be instituted.

Procedure

If the call is dropped within the first 15 minutes of the start time, regardless of the error code reported, the HSC should automatically call the dropped video site's room telephone number to determine if they dropped the call deliberately or if there was a network error. If there is an error, the HSC or the OSC if they made the call initially, should immediately re-launch the call and the meeting will continue.

If the call is dropped after the first 15 minutes, and a network or MCS error code is reported, the HSC should automatically call the dropped video site's room telephone number to determine if they dropped the call deliberately or if there was a network error. If the call needs to be reconnected, the HSC should proceed with re-launching the call.

If the call is dropped after the first 15 minutes, and a call disconnect code is reported, the HSC should not call the dropped video site's room telephone number. It should be assumed that the site deliberately hung up the video call. If the site needs to be reconnected to the conference, the OSC or local site coordinator should call the HSC to report the problem. At that time, the HSC should proceed with re-launching the call. The goal is to strike a balance between delivering proactive service and being perceived as an annoyance.

End user training will address the issue of losing a meeting quorum as a result of re-launching a failed call.

If the call cannot be reconnected for any reason within 5 minutes, an audio add-on call should be placed. This action will connect the missing video site to the other video sites via audio until the video system can be reconnected.

2.9 Problem Resolution/Escalation

Policy

In the event of a call launching failure, the problem resolution/escalation process should be used.

Procedure

1. Report the problem to the HSC
2. Log the problem for reporting purposes and trend analysis.
3. Work aggressively to make the affected conference a success.
4. Report problem to the vendor for engineering support and technician dispatch.
5. Identify root cause of problem.
6. Take steps to resolve problem.

The Problem Resolution/Escalation procedure is discussed in the Maintenance section of this document.

2.10 Audioconference Backup to Failed Video

Policy

Videoconferencing is a tool to enable people to conduct meetings. The goal is to never have a meeting ~~fail~~, even if the videoconference does fail. In order to guarantee that all meetings can take place regardless of technology issues, a backup system of audioconferences should be designed.

Procedure

If the videoconference is not active at the scheduled start time, the OSC should hold the meeting via audioconference. All sites should already be in the audioconference from the meeting set up. The OSC must notify the HSC that the videoconference failed and the audioconference call will be used as a backup.

If only one or two sites in a multipoint call are unable to connect into the videoconference, they should be prompted to join the conference through the audio add-on feature of the videoconferencing systems.

2.11 Partnered Sites

Policy

It is always preferential that partnered sites dial in to the MCS.

Procedure

Certified partner sites should always dial in to the MCS. The hub site bears the cost for long distance out-dialed calls from the MCS to partner sites. The partner site bears the long distance cost of calling into the MCS. When applicable, line charges will be billed to the site of the OSC.

Non-certified partner sites should be allowed access to the MCS. Failed conferences resulting from non-certified sites should be reported as part of the performance reports. However, these sites should not impact the overall service level statistics.

If a local site coordinator requests a conference with a non-certified site, the HSC should make a reasonable effort to certify the site in advance of the conference. If the site certification process cannot be completed prior to the conference, a best effort should be made to complete the conference. The site certification process should continue after the conference so the site would be certified for future conferences.

3.0 MULTIPOINT CONFERENCE SERVER (MCS)

3.1 Inbound vs. Outbound Dialing Rules

Policy

The MCS is able to place or receive video calls; however, in order to reduce long distance charges at the hub site, all partnered sites will be responsible for placing their own video calls by dialing in to the MCS.

Procedure

The partner site should be provided with a specific phone number and network configuration to use to call the HSC and MCS.

3.2 Video Greeting/Meeting Kickoff

Policy

If requested, the HSC could attend the beginning of the videoconference via a video system to perform a video greeting/meeting kickoff.

Procedure

As people are added to the conference, the HSC could greet them and "usher" them into the conference.

Just prior to the start of the meeting, the HSC can provide a brief set of instructions to the participants regarding the use of the system, videoconferencing etiquette, and how to access the HSC for more assistance if required.

At the end of the meeting "kickoff," the HSC should disconnect from the conference and continue to monitor the quality of the conference through the MCS software. The OSC is encouraged to make the users familiar with the system so this is not necessary.

3.3 Escalation

Policy

The HSC should use the established problem resolution and escalation procedures to ensure that conferences are performed successfully. In the event of a MCS failure, the following problem resolution/escalation process should be used.

Procedure

1. Log the problem for reporting purposes and trend analysis.
2. Work aggressively to make the affected conferences a success.

3. Move the conference to a different MCS resource.
4. Transition problem to Norstan engineering support and technician dispatch.
5. Identify root cause of problem.
6. Take steps to resolve problem.

3.4 Security

Policy

All video equipment should be located in a designated videoconferencing room. The room should be in a secure location free of severe environmental conditions. End users should take reasonable precautions to prevent unauthorized access to the video system electronic components, cabling and network connections.

3.5 Access to Equipment for Technicians

Policy

On-site access for vendors and sub-contracted technicians will be required. Vendor personnel or sub contractors will follow all end user security procedures. If security protocols create time delays in resolving equipment or service issues, these delays should be noted in the monthly performance reports and the delayed incidents should be removed from performance measurements.

4.0 SERVICE

4.1 Single Point of Contact Access to the HSC

The Support service section is based on a "Single Point of Contact" (SPOC) strategy.

Policy

End users and site coordinators can call MAG for scheduling conferences and MAG or the vendor for problem reporting.

4.2 End User Support

4.2.1 Training

Policy

The vendor will provide videoconference end user training to all site coordinators. Training will include basic system operation, who to call for what, and tips on presentation techniques.

After completion of the training class all site coordinators should be able to train end users at their jurisdiction on the use of the videoconference equipment.

Procedure

Please see the Training Course Plan for detail.

4.2.2 End User Support

Policy

Operation assistance should be provided to all site coordinators.

Procedure

If a problem or question comes up, the end site coordinator can call the HSC or the vendor who should assist with answering the questions and help with problem resolution. If the problem cannot be resolved, a trouble ticket should be opened with the manufacturers/vendors for them to troubleshoot until the problem has been resolved.

4.2.3 Questions/Answers

Policy

The Regional Videoconferencing Office (RVO) should be available for ad hoc questions. If the RVO is not able to answer the question, it should be escalated to the manufacturers/vendors technical support.

4.2.4 Problem Resolution

Policy

When technical or non-technical problems occur, the first point of contact for end users should be their site coordinators.

Procedure

The site coordinators should try to resolve the problem or escalate it to the proper resources, such as MAG or the vendor.

4.3 Site Profiles

Policy

A Site Profiles database should be maintained for all teleconferencing end points.

Procedure

As sites are certified or brought on to the network, the hub site should maintain a copy of the Site Profiles database, including equipment type, serial numbers, software revision levels, peripheral equipment and site contact information. It should be a joint effort between the hub site and each end point location to maintain an updated personnel list. The Site Profiles database should have adequate security. See the Site Information Form.

4.4 Signs and Posted Communication

Policy

The HSC is responsible for distributing hub site contact lists, updated site profile lists, and user guides, that would increase the user-s satisfaction of audio/videoconferencing.

Procedure

The hub site should provide each end site with a hub site coordinator contact list which will include: roles and responsibilities, phone numbers and e-mail addresses.

Each site should also receive quarterly, an updated site coordinator contact list.

Additional material should be distributed as needed, such as quick glance user guides or other documentation that should increase the user's satisfaction.

5.0 SITE CERTIFICATION

5.1 Site Certification

Policy

Every video site should be certified. The site certification process collects information about the videoconference site, its equipment, communication capabilities, contacts and phone numbers.

Procedure

The OSC must ask all non-certified sites to complete the Site Certification Form. The OSC will know if a site is non-certified when completing The Scheduling and Documenting Form. A non-certified site is a new video site with whom none of the MAG or MAG member agency sites have ever teleconferenced. Since little or nothing is known about the non-certified site, the site must complete the Certification Form which provides contact and video site information. The OSC must give the completed Site Certification Form to the HSC one week prior to the meeting so that the HSC can update the Site Profiles database.

If the certification form indicates that a site is non-certified, then the HSC will collect all the information and perform a test call three days prior to the meeting to verify the system will work correctly and that the HSC can establish a connection with the non-certified site.

5.2 Site Information

Policy

The HSC should maintain current information on all end sites by having them complete the Site Information Form. (The Site Information will be available for end and hub site viewing and it will be a secure site.) This database will contain all site information for MAG end sites as well as any new partnered sites who complete the Site Certification Form. A partnered site is a site that is outside the RVS, not directly under the control of any of the MAG end site coordinators, and is certified.

Procedure

The HSC will create a Site Profiles database and update it with new end or partnered sites and changes to existing end or partnered sites on an as needed basis. If there are any changes that need to be made to the Site Profiles database, the site coordinator is responsible for notifying the HSC as soon as possible. A complete review of the site database should occur quarterly.

5.3 Database Maintenance

Policy

The Site Profiles database should be maintained by the hub site and a complete review of the database should be conducted quarterly. It should be each end users responsibility to notify the hub site of personnel changes or other information that should affect the use of the room (site coordinator job changes, construction, special holidays, etc.)

Procedure

The HSC will create and maintain the Site Profiles database.

5.4 Addition of Partnered Sites

Policy

Partnered sites should be added to the database in two ways.

Procedure

When end users request a conference with a site that has not been certified, the HSC should initiate the certification process. End users or site coordinators may also submit a request for the addition of partnered sites.

6.0 MAINTENANCE AND SUPPORT

6.1 MAG Maintenance Contracts

Policy

MAG will maintain comprehensive maintenance contracts on all videoconferencing equipment for the first three years of the MAG RVS. A binder with manuals, serial numbers and warranty cards will be provided by the vendor. Regional funding for local maintenance may not be available after this three year period.

6.2 Problem Priority

Policy

MAG will ensure that time critical problem requests will have a higher priority than less time critical requests. Each problem will be given a priority level from one to five depending on the severity of the problem. The following describe the priority levels:

1. No video or network connection or system not working.
2. No audio connection (audio may be established using the Latitude).
3. Slow network connection (1 ISDN line or equivalent not functioning).
4. Poor quality video or audio.
5. Problem does not affect functionality of the system.

6.3 Problem Resolution/Escalation

Policy

The end site coordinator reports all multipoint videoconferencing issues to the HSC by calling (602) 452-5095 or by e-mailing at rvshelp@mag.maricopa.gov. The end site coordinator may call Norstan directly for non-bridge issues. In this situation, the end site coordinator is responsible for informing the HSC. If the HSC accepts the call, the HSC documents the issue on a trouble ticket, which is logged into the MAG trouble ticket register. If necessary, the HSC should contact the appropriate site coordinator for on-site assistance. If the HSC and end site coordinator are unable to correct the problem or address the issue in question, the HSC calls Norstan and reports the problem.

Once the problem has been resolved, the service ticket should be closed detailing the resolution and the date of the resolution. See Trouble Ticket Plan for more detail.

Procedure

1. End site coordinator contacts either the HSC or the vendor by phone, fax or e-mail with full description of problem
2. The HSC or vendor documents problem on a trouble ticket, identifies the priority and issues the end site coordinator a call record number
3. All trouble tickets will be logged in the trouble ticket register
4. The HSC or the vendor, whomever the end site coordinator opened the trouble ticket with, keeps the end site coordinator informed on the issues until the problem is resolved.
6. The HSC/vendor sends a formal e-mail notifying the end site that the problem has been resolved and the ticket will be closed.

6.4 Remote Diagnostics

Policy

An engineer at the vendor should dial into the on site equipment to remotely trouble shoot the problem, once a trouble ticket has been opened.

6.5 Technician Dispatch

Policy

If the problem cannot be diagnosed remotely, the vendor should have a technician on site within four business hours from the time the HSC or site coordinator logs the call with the vendor. Technician dispatch should be coordinated with the HSC and/or end site coordinator through the vendor.

6.6 Parts

Policy

Engineers should have identified the part(s) that need to be replaced, during the remote diagnostic phase of the problem resolution process.

Procedure

The vendor should then dispatch the necessary part(s) for four business hour arrival. Once the estimated time of arrival for the part(s) has been verified, a technician should be dispatched. The vendor has guaranteed that all parts will be available within four business hours, from the time the HSC or site coordinator logs the call with the vendor, or that a replacement unit will be available.

6.7 Closing the Call

Policy

Once the problem has been resolved the MAG and/or vendor trouble ticket should be closed. The HSC should be notified of the ticket number, resolution, and the time it was closed by the MAG and/or vendor. The HSC or vendor should then notify the appropriate end site coordinators of the closed ticket.

7.0 TRAINING

Training Philosophy

To ensure success of the MAG RVS, MAG supports a program of comprehensive and on-going training. The steps taken to ensure this success and that MAG meets this philosophy are listed below in the policies and procedures and in the Training Course Plan.

7.1 Video vs. Face-to-face Training

Videoconferencing is well suited for delivering training services. It is helpful for the end users and site coordinators to use the equipment on which they are being trained. Face-to-face training should also be available.

Policy

A standard suite of training classes should be routinely held via videoconference.

It is preferable for training to be held via videoconference in order to get the full benefit of learning/using the videoconferencing equipment and features.

Face-to-face delivery of the training classes should be arranged on an as needed basis.

7.2 Training Courses

Policy

HSC and backup(s) will be trained on Audio and Video Conferencing End User, MCS Functions, ACS Functions and custom room training.

Site coordinators and backup(s) will be trained on videoconference end user training.

End users will be trained on being a participant in a videoconference, being a leader in a videoconference, being a presenter in a videoconference, videoconferencing etiquette, system overview and tips and techniques.

7.3 Scheduling

7.3.1 Frequency of Training Courses

Policy

All training should be provided on a routine scheduled basis, as demand requires. Refresher courses will be offered to new site coordinators.

7.3.2 Scheduling Training Courses

Policy

End users should be able to schedule end user training sessions as needed through their site coordinators. All site coordinators will complete a ATrain the Trainer® course and will be able to provide basic end user training. Site coordinators should be able to schedule site coordinator training sessions as needed through the HSC.

Procedure

1. To schedule an end user training session, the end users should notify their site coordinator.
2. To schedule a site coordinator training session, site coordinators should notify the HSC.

7.4 Training Materials

Policy

The HSC or end site coordinator providing the training, should provide each trainee with a set of training materials prior to the training session. Refer to Training Course Plan for detail.

7.5 Quick Reference Guides

Policy

Two copies of quick reference guides should be maintained in each videoconferencing room.

7.6 Training Courses to be Offered

Policy

Those using the RVS will be trained to adequately use and support the system as needed. Refer to Training Course Plan for detail. See below for a brief explanation of the courses in the Training Course Plan.

End User Training

End users will be trained on being a participant in a videoconference, being a leader in a videoconference, being a presenter in a videoconference, videoconferencing etiquette, system overview and tips and techniques. End user training is a comprehensive overview for beginners to advanced end-users to gain a high comfort level with the videoconferencing equipment.

This course will empower the end-user to confidently participate in a videoconference call and give them a strong sense of familiarity with the equipment configuration and capabilities.

Site coordinators will be trained on set-up, diagnostics, administration functions for the VTEL Galaxy 2500 or 5500, tips, techniques, and elements of coordinating videoconferences.

7.7 Executive Training

Policy

If there is sufficient interest, executive level training (training given to elected officials, senior member agency staff, etc.) will be provided.

8.0 COMMUNICATIONS AND MARKETING

Policy

The success of the MAG RVS will be dependent on the effectiveness of communications and marketing endeavors.

An effective Communications and Marketing Plan for the MAG RVS will be created.

9.0 STAFFING

Policy

One of the main reasons some other organizations have experienced problems with their videoconferencing environment is the lack of appropriate staffing. A Staffing Plan will be created and maintained to identify appropriate staffing requirements and job functions both at the hub site and end sites to ensure delivery of high quality service.

10.0 GENERAL POLICIES

10.1 Telephone Access

Policy

A telephone should be available in each site's teleconference room so that users of the meeting room can contact help when necessary.

Procedure

The site coordinators of all sites will post a sheet, in the teleconference room in a visible location, containing the phone numbers for the local site coordinator, backup site coordinator, HSC and vendor. MAG will provide the Telephone Contact sheet to all site coordinators for them to post, as well as put the contact sheet on the web.

10.2 MAG Addressing Conflicts in Meeting Room Use

Policy

In the event of conflict, every effort should be made to minimize vehicle miles traveled.

Procedure

Here are some things to consider when addressing a meeting room conflict:

1. Consider changing priorities at the end site
2. Use audio conferencing
3. Go to neighboring jurisdiction and use its videoconferencing equipment
4. Drive to MAG or other site if not a MAG meeting

Final meeting conflict resolution should be documented and sent via email or fax to the HSC within three business days of a meeting.

10.3 Outside Participation at MAG Meetings

Policy

Encourage public participation by allowing non-MAG sites to connect to a teleconferenced public meeting.

Procedure

Allow outside participants to join a MAG meeting providing that the MAG multipoint conference server (MCS)/audio conference server (ACS) can accommodate them. They may need to be bumped if MAG or MAG member

agencies need the capacity to serve MAG needs. All documentation must be completed (Refer to The Scheduling and Documenting Form). If it is a public meeting and there is enough capacity in the ACS then those who are being bumped from the videoconference can participate via audioconference call.

10.4 Overflow Policy

Policy

MAG will make every effort to accommodate meetings when the MAG MCS or ACS are at capacity. Meetings moved to an alternate MCS or ACS will be determined by the priorities listed in 1.8, Priorities for Teleconferencing Meetings.

Procedure

In case of overflow, MAG will utilize other organizations= MCS or ACS. The HSC will coordinate all overflow of video and/or audioconferences.

Outside vendors offer several MCS locations and a large number of video MCS ports. As a result, it can be guaranteed that there will always be video ports available to support the end user sites. The hub site should contact a Multipoint Service Bureau and have all end user sites certified on the service bureau's system.

The average cost of a videoconferencing service bureau using a dial-in method at 384Kbps for one hour is \$125/hour per site. The host site pays the cost of using an outside service bureau.

10.5 Recording Meetings

Policy

MAG will not record teleconferences. Meeting minutes should be taken to record dialogue at the meeting, if necessary.

10.6 Standards

Policy

All videoconferencing equipment must satisfy the following minimum standards:

- H.320 Compliant
- H.323 Migration Path
- Data Rate of 384 Kbps
- Data Sharing Capable

10.7 Equipment Upgrade Process

Policy

The HSC is responsible for working with vendors to obtain agreed upon equipment upgrades and working with the end site coordinators for installation.

10.8 Communication Process

Policy

All communication (e.g. forms) will be sent by e-mail unless requested to be sent by fax.

10.9 Alternative Use of Network

Policy

The MAG Regional Videoconferencing System (RVS) is a three year demonstration project funded through the Federal Highway Administration (FHWA). End sites will receive network for the MAG RVS which must be available for videoconferences at all times. It is a requirement of FHWA that a member agency may only use the network for videoconferencing. This policy may be modified at some later date in conjunction with FHWA.

10.10 Private Business Use

Policy

The MAG Regional Videoconferencing System (RVS) is a three year demonstration project funded through the Federal Highway Administration (FHWA). End sites will receive videoconferencing equipment for the MAG Regional Videoconferencing System which must not be rented out. Private sector companies doing business unrelated to the MAG RVS or to MAG member agencies may not use the videoconferencing units supplied to the member agencies.